

**FIG. 1**

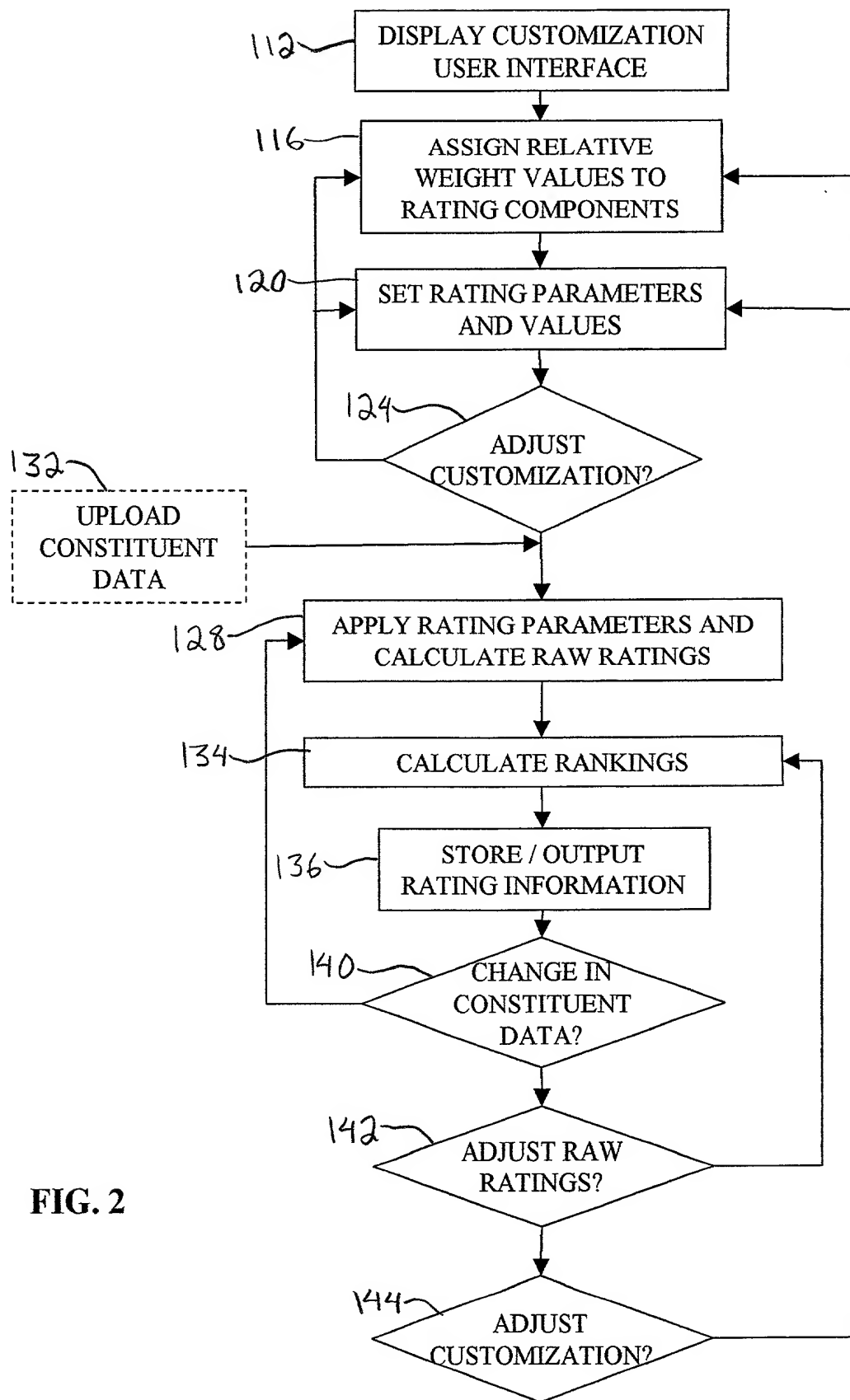


FIG. 2

✓ 30

Prospect rating settings

☐ Step 1: Set relative weights for 3C categories and category elements

Category and elements	Category weight	Element weight
Commitment	34%	
Connection		34%
Gift Recency		33%
Gift Frequency		33%
Element Weights Subtotal		100%
Concern	33%	
Concerns and Interests		100%
Element Weights Subtotal		100%
Capacity	33%	
Average Gift Size		25%
Largest Gift Size		25%
Total Gift Size		25%
DataMagic Rating		25%
Element Weights Subtotal		100%
Category Weight Total	100%	

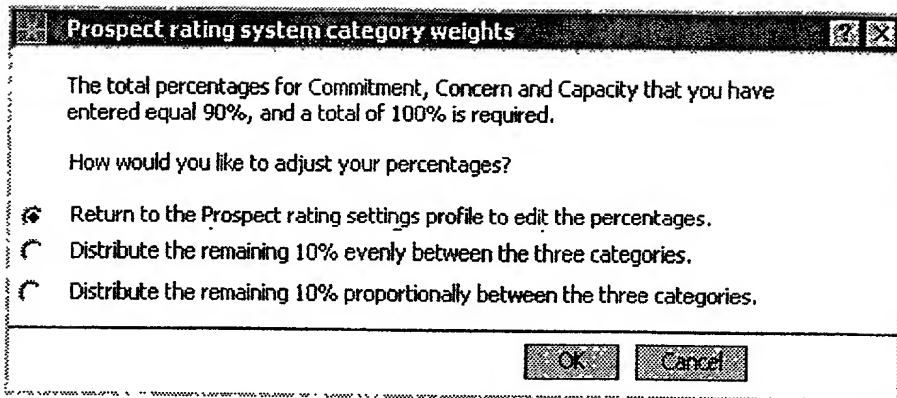
☐ Step 2: Set parameters for commitment elements

☐ Step 3: Set parameters for concern elements

☐ Step 4: Set parameters for capacity elements

Save & new Save & stop Cancel

FIG. 3



**FIG. 4**

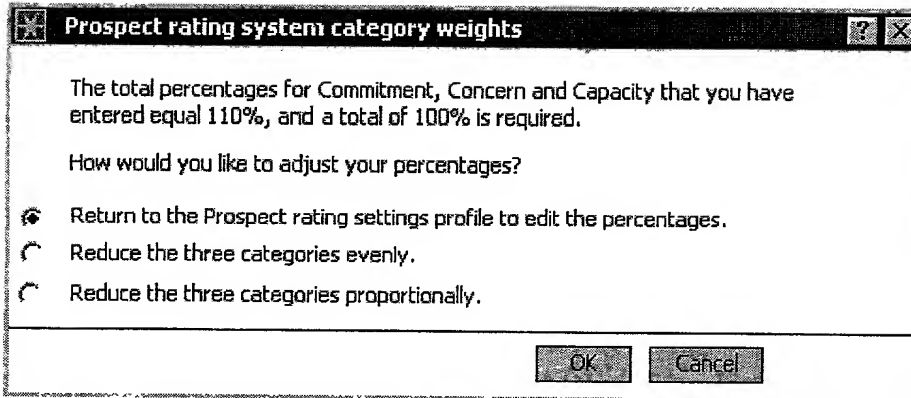


Fig. 5

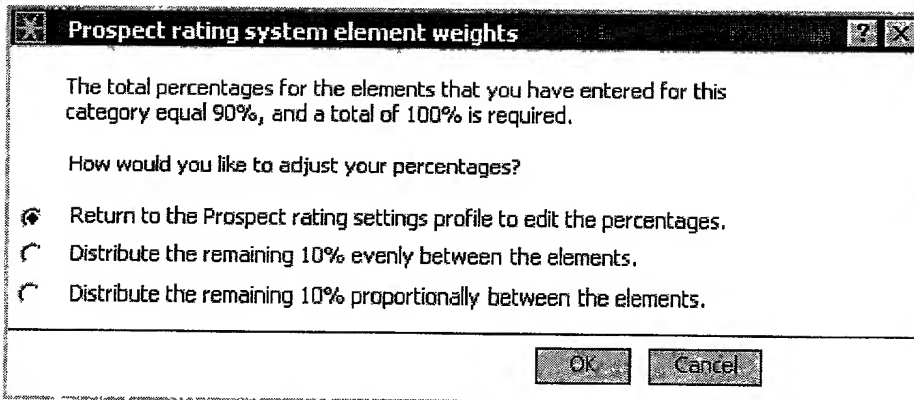


Fig. 6

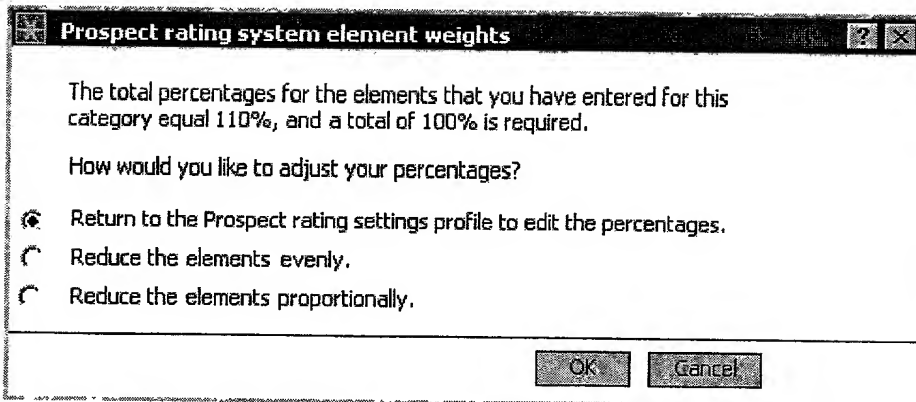


Fig. 7

30

File Edit View Favorites Actions Help Find

Back Forward Home

Valley Academy

New  
Delete  
Duplicate  
Refresh

Print & output  
Print  
Other output  
Output options

Advanced find/search  
Perform search request

Valley Academy  
Profile  
Settings  
Field customization  
Prospect ratings settings  
User profiles list  
Tables list  
Office documents  
Database status

Go to...  
Relating settings top  
Relative weighting  
Commitment  
Concern  
Capacity

Prospect rating settings

Step 1: Set relative weights for 3C categories and category elements

Step 2: Set parameters for commitment elements

Connections	Priority level	3C Points (0-100)
Board of Directors	1	90
Alumni	2	100
Parent	3	85
Student	4	50
Staff	5	60
Volunteer	6	50
Friend	7	10
Grantor	8	10
Vendor	9	10

Gift recency	Period start	Period end	3C Points (0-100)
If the last gift was received within the last		6 months	100
If the last gift was received between the last	6 months	1 year	50
If the last gift received more than	1 year		25

Gift frequency	Range start	Range end	3C Points (0-100)
If the number of gift(s) received per year is greater than	8		100
If the number of gift(s) received per year is between	4	8	50
If the number of gift(s) received per year is less than	4		25

Save & new Save & done Cancel

FIG. 8

Period end

1 week  
2 weeks  
3 weeks  
1 month  
2 months  
3 months  
4 months  
5 months  
6 months  
7 months  
8 months  
9 months  
10 months  
11 months  
1 year  
2 years  
3 years  
4 years  
5 years  
5+ years

FIG. 9

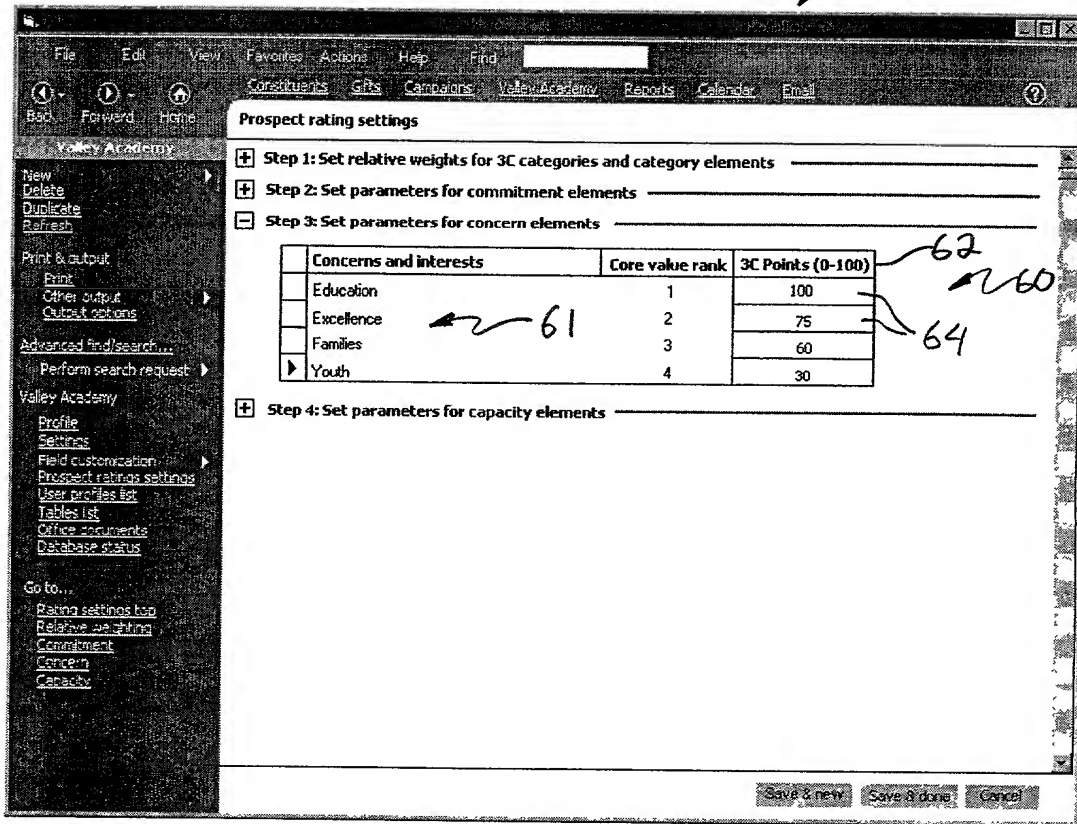


FIG. 10

30

File Edit View Favorites Reports Help Find

Back Forward Home

Prospect rating settings

Valley Academy

Step 4: Set parameters for capacity elements

Average gift size	Range start	Range end	3C Points (0-100)
If the average gift size is greater than	\$5,000		100
If the average gift size is between	\$1,000	\$5,000	50
If the average gift size is less than		\$1,000	25

Largest gift size	Range start	Range end	3C Points (0-100)
If the largest gift size is greater than	\$10,000		100
If the largest gift size is between	\$5,000	\$10,000	50
If the largest gift size is less than		\$5,000	25

Total gift size	Range start	Range end	3C Points (0-100)
If the total gift size is greater than	\$25,000		100
If the total gift size is between	\$10,000	\$25,000	50
If the total gift size is less than		\$10,000	25

DataMagic™ major gift code		
Elements	DataMagic™ code	3C Points (0-100)
High affluence, high affinity	A	100
High affluence, moderate affinity	B	75
High affluence, low affinity	C	60
Major Gift Research Candidate	R	60

Save & new Save & done Cancel

Prospect rating settings step 4 data (10/10/01)

Fig. 11



30

Prospect rating settings

DataMagic™ planned gift code	DataMagic™ code	3C Points (0-100)
High affluence, high affinity, 55+	A	
High affluence, moderate affinity, 55+	B	
High affluence, low affinity, 55+	C	
Planned Gift Research Candidate	R	

DataMagic™ affluence and affinity rating	DataMagic™ code	3C Points (0-100)
High affluence, high affinity	9	
High affluence, moderate affinity	8	
High affluence, low affinity	7	
Moderate affluence, high affinity	6	
Moderate affluence, moderate affinity	5	
Moderate affluence, low affinity	4	
Low affluence, high affinity	3	
Low affluence, moderate affinity	2	
Low affluence, low affinity	1	

Save & new Save & done Cancel

FIG. 12

30

Prospect rating settings

DataMagic™ annual fund long term rating	DataMagic™ code	3C Points (0-100)
Special Handling	SH	
\$10,000+	90	
\$5,000 - \$9,999	80	
\$2,500 - \$4,999	70	
\$1,500 - \$2,499	60	
\$1,000 - \$1,499	50	
Potential \$1,000+	54	
\$500 - \$999	40	
\$250 - \$499	30	
\$100 - \$249	20	
Less than \$100	10	

Save & new Save & done Cancel

FIG. 13

80

82

84

File Edit View Favorites Actions Help Find  
Back Forward Home  
Consistants Gifts Campaigns Valley Academy Reports Calendar Email

Mr. William A. Cote (Bill) - Parent - #6735 PRS#: 134/76%

☐ Prospect rating

Prospect rating	Raw rating	Rating as of	Percentile	Last ranked on
Prospect rating	134	3/23/01	76%	12/31/00

☐ Commitment

Raw rating	Rating as of	Percentile	Adjustment comment
Connection	66	11/7/00	
Gift recency	25	3/23/01	
Gift frequency	17	3/23/01	
Adjustment	0		
Commitment summary	54	3/23/01	71%

☐ Concern

Raw rating	Rating as of	Percentile	Adjustment comment
Concern	190	8/29/00	
Adjustment	0		
Concern summary	48	8/29/00	85%

☐ Capacity

Raw rating	Rating as of	Percentile	Adjustment comment
Average gift size	20	3/23/01	
Largest gift size	23	3/23/01	
Total gift size	15	3/23/01	
DataMagic™	71	10/1/00	
Adjustment	0		
Capacity summary	32	3/23/01	72%

☐ DataMagic™ information as of 10/1/00

Subject

Major gift code  
Affluence and affinity rating  
Annual fund short term  
Annual fund long term

Rating

Major Gift Research Candidate  
Moderate affluence, high affinity  
Potential \$1,000+  
\$5,000 - \$9,999

FIG. 14

Connection elements

Bill Cote's Connections

Connection	Priority level	3C points
Parent	3	85
Volunteer	6	50

OK

86

FIG. 15

Changes to donor rating — this week — edit —

Mr. David G. Beckham	83	+18
Mrs. Sandra Fiddlesticks (Sandy)	77	+15
Lawrance L. Leong (Larry)	66	+12
Mrs. Gerry Gerald	72	+11
Ms. Catherine Cummings (Cathy)	50	+10
Mr. Ernest H. Dunkins	66	-12
Mark Mintor	59	-16
Mrs. Lolla Vinquette	61	-17

FIG. 16

Prospect rating parameters

Show prospects whose raw rating has changed by at least: 94

OK Cancel

Prospect rating parameter subwindow

FIG. 17

96

<b>Mr. Patrick F. Gregory (Pat)</b>		<b>Board of directors, Former</b>		<b>Rating: 92 Rank: 99%</b>	
1200 Forest Glen Rd. Andover, MA 02133		Home: 978-343-7866 Work: 617-766-1210 x122 pgregory@mediaone.net		Volunteer Friend Commitment: 100 Concern: 95 Capacity: 98	
<b>Most recent special goal</b>		<b>By date</b>	<b>Status</b>	<b>Comment</b>	
Become part of Platinum club		Thu. 11/01/01	Active	Blah blah blah	
<b>Contacts</b>	<b>Type</b>	<b>Date</b>	<b>Subject</b>	<b>Assigned to</b>	
Last:	Call	Wed. 5/1/01	Discuss Discovery Phase Committee Appointees	Chris Seymour	
Next:	Appointment	Thu. 6/15/01	Lunch to discuss campaign pledge	Chris Seymour	
<b>Giving summary</b>		<b>First</b>	<b>Last</b>	<b>Largest</b>	<b>Total</b>
<b>Amount</b>		\$100	\$15,000	\$50,000	\$95,000
<b>Date</b>		12/12/92	4/1/01	7/10/99	6 years of consecutive giving 9 total years of giving

FIG. 18